Inviscid TotalABA Security with MRC

The TotalABA application utilizes a flexible security model tailored around the various sections in the application. If the standard security as described in this document does not work for your practice, or if you have any questions, please contact us at support@inviscidsoftware.com.

Security Groups

There are five standard security groups. A user must belong to one of these groups.

- **Administrator** - An administrator is able to create and modify all record types, with the exception of the restricted access record types. Furthermore, by default only administrators have access to view and create session approvals.
- **BCBA** - A Board Certified Behavior Analyst (BCBA) will be able create and modify all record types with the exception of the restricted access record types and the additional ones listed below.
  - Appointment Types – Read only access.
  - Assigned Therapist – Read only access.
  - Contracts – Read only access.
  - Expense Categories – Read only access.
  - Funding Sources – Read only access.
  - Procedure Codes – Read only access.
  - Staff Members – Read only access to all staff members, limited to just the name and billing provider indicator fields. Cannot view any other staff member information.
  - Student Locations – Read only access.
  - Time Categories – Read only access.
- **Office Staff** - This group should be used for the staff in your practice that are not a BCBA or a Therapist, but are also not an administrator. They will be able create and modify all record types with the exception of the restricted access record types and the additional ones listed below.
  - Appointment Types – Read only access.
  - Assigned Therapist – Read only access.
  - Contracts – Read only access.
  - Expense Categories – Read only access.
  - Funding Sources – Read only access.
  - Procedure Codes – Read only access.
  - Staff Members – Read only access to all staff members, limited to just the name and billing provider indicator fields. Cannot view any other staff member information.
  - Student Locations – Read only access.
  - Time Categories – Read only access.

- **Therapist** - The therapist group is used for all therapists, including front line and senior therapists. They will be able create and modify all record types with the exception of the restricted access record types and the additional ones listed below.
    - Allowable Procedures – Read only access.
    - Appointment Types – Read only access.
    - Assigned Therapist – Read only access.
    - Associated People – Read only access.
    - Authorizations – Read only access.
    - Calendar – Can only view "my schedule" which are appointments that the user is assigned to. No access to schedule views. *Note that this only affects the calendar, it does not prevent users from viewing appointments via a student or the appointments list (record level security is required for this).*
    - Contracts – Read only access.
    - Expense Categories – Read only access.
    - Funding Sources – Read only access.
    - Procedure Codes – Read only access.
    - Staff Members – Read only access to all staff members, limited to just the name and billing provider indicator fields. Cannot view any other staff member information.
    - Student Locations – Read only access.
    - Time Categories – Read only access.
- **Basic User** – This user is given read access to all sections in the application. However, they will not be able to create or modify any record types unless they are given permission to do so (excluding the restricted record types). If this security group is selected for a given user, please let us know if they should be allowed to create/modify any of the below record types.
    - Appointments
    - Appointment Types
    - Assigned Therapist
    - Associated People
    - Authorizations
    - Calendar – Can only view "my schedule" which are appointments that the user is assigned to. No access to schedule views. *Note that this only affects the calendar, it does not prevent users from viewing appointments via a student or the appointments list (record level security is required for this).*
    - Contracts
    - Diagnoses
    - Expense Categories
    - Expense Tracking
    - Funding Sources
    - Sessions
    - Staff Members – Read only access to all staff members, limited to just the name and billing provider indicator fields. Cannot view any other staff member information.
    - Students

    - Student Locations
    - Time Categories
    - Time Tracking
- **Custom** – We can provide custom level security for your users including limited access to specified students and/or limited access to fields on a record. Please contact us with the details of what is required.

User Settings

In addition to the security groups, it must be determined if the user has the following.

- **Allow Scheduling** – This determines if the user should be a valid entry for the Assigned To on an Appointment. In other words, you can create appointments for this user and view them on the calendar. *This does not control if the user can create/modify appointments.*
- **Allow Session Sign-Offs** – This determines if the user should be able to sign-off on a Session. This is used to generate a billing message in a supported practice management solution and/or to set the status of the session as completed. Typically, this option is only given to a supervising provider. When billing insurance, this is usually the person that will have the session charges billed through their NPI.

Additional Permissions

Additional permissions may be given to any of the users. These additional permissions are listed below.

- **List & Report Management** - Access to manage public lists and reports. This includes creating and modifying lists and reports. By default, this includes the ability to run reports.
- **Run Reports** - Ability to run and export reports.

Restricted Record Access

All users will have the following maximum access to the sections below.

- **Contracts** – Read only access to contract with a funding source of insurance. These are automatically created and updated in the practice management system.
- **Diagnosis Codes** – Read only access. These will be maintained by MRC.
- **Funding Sources** – Read only access to funding sources with a funding type of insurance. These are automatically created and updated in the practice management system.
- **Locations** – Read only access. These are automatically created and updated in the practice management system.
- **Modifier Codes** – Read only access. These will be maintained by MRC.
- **Procedure Codes** - Read only access to procedure codes with a type of CPT. These will be maintained by MRC.